Email sent 08/10/16

Hi Junjie,

Thanks for the slides.
I'm cc'ing the rest of the team, because I would assume others will have the same or similar question, and since we are very short in time… let's make sure we are all on the same page.

To compute the budgets for the periods:
 — 10/1/2016 - 1/31/2017
 — 2/1/2017 - 1/31/2018 (NSF FY17)

you need to start from your P6 tasks and do the resource loading of each tasks using the hourly rates.
See the excel template spreadsheet I have sent and the hourly rates.

Then you sum up the tasks cost (using the breakdown of labor, material and travel) for each period above and compare the FY17 to the budget sent to John Hobbs for the cooperative agreement (CA). We need consistency between the resources loaded budget and the one submitted for the CA at a 20% level.

The point of the exercise is to make sure the P6 tasks and their cost match the funding available and iterate to make it match.

Recall, the budget from the cooperative agreement was derived from the Frozen budget of April 16 and the number slightly reworked to match NSF fiscal year, assuming a flat labor profile, plus small corrections so that the numbers matched the boundary he was given for the CA.
I'm attaching John Hobbs email + spreadsheet explain how he got the numbers.

Cheers
-a

Email sent 08/09/16

Dear all,

Following the quick meeting on Friday, we wanted to send you the clarifications on how to provide the budget and the resource loading that Srini requested.
This took few iterations with management since I had additional questions.

 — You should perform a resource loading of your P6 tasks covering the period Oct-2016 to Jan-2018, starting from your P6 excel spreadsheet.

See example spreadsheet below and excel/pdf of the hourly rate.
Email to use the P6 spreadsheet with resources loaded. This will be attached to the scrubbing agenda.
— The hourly rates are the ones you provided around June for P6 [1]. These are fully loaded: i.e. includes salary, fringe and indirect.
— **What they care to see is the total labor hrs and cost, plus cost of material and travel.**
I filled in an example doing the computation starting from FTE fraction. You can of course enter directly labor hrs.
If a task is done by more than one personnel, they want to see the total labor hr and cost of the total personnel.
We don't really need to show the FTE, although I find this convenient to start from.
Once you are done, please hide columns P & Q and also hide the split of tasks across the personnel (L30 & 31 in the example attached).

— Provide budgets summing the period Oct16-Jan17 and Feb17-Jan18, the later corresponds to the budget you provided for the cooperative agreement.
If a task straddles the date boundary, then estimate the fraction of effort required for that task that falls within the time range specified above.
Only specify that number -- This is simply needed for determining the FY17 budgets.

It is crucial that the slides reflect the P6 tasks and the resources loaded, and that these are well justified.

Cheers
-a&t

[1] For the labor rate calculation, Chuck used 1760hr/yr

Email sent 08/04/16

Dear all,

The Muon R&D scrubbing for FY-17 is scheduled to take place on August 22nd, at LBNL https://indico.cern.ch/event/536985/
Our understanding is that remote connection to the meeting will be available.

In order for us to put together the presentation for this meeting, we would like to ask you to prepare the following material using the template slides attached [2].
We would like that you send us back your slides no later than next Thursday, August 11th.

The slides should contain the following information:

1) Overview slide of what is your group working on
2) A slide describing the work performed in FY16 (what was planned and % complete)

Include a backup slide with the budget (%FTE + cost, material, travel) for FY16 including any RBT you have received.
3) List the set of activities and milestones for each FYs up to the construction starting April 2020, with primarily focus (i.e. more details) for FY17.
You should use the tasks/milestones from your P6 tasks schedule and perform resources loading of these tasks for FY17.
i.e. give details of FTE fraction and cost (+names if you have them), material to purchase and travel justifications.
For FY17 in particular you should make case as to why the task(s) and the funds associated with them are needed in FY17.
Describe the impact of not funding or delaying the task(s) in FY17.
4) A detailed table with the budget request for each FYs
The baseline is to start with the lasted R&D budget from the CDR [1].
Don't assume that you will necessary get what is budgeted (item #3 is is thus critical), and if you ask for more, it needs to be well motivated.
5) Include a backup slide with the current R&D budget for your WBS i.e. from [1].

Let us know if you have any issues with getting the tasks done within the schedule you have planned for and if there is any lack of resources or any other issues that you are foreseeing.

[1] The latest budget from March 2016 can be found here:
https://indico.bnl.gov/conferenceDisplay.py?confId=2020